

Developmental Learning

Attendees improve their depth of understanding by examining the workflows of key financial systems and the mechanics of key products.

Modules

Introduction to Capital Markets Fintech

Module reviews the development of capital markets Fintech, front, middle and back office applications, and key vendor solutions that are changing the market.

Areas covered:

- Innovation misconceptions
- Drivers and obstacles for adoption
- Key providers in each asset class
- Up and coming ideas that could shift markets

Introduction to ESG Investing

Financial market investments are making a material impact on how society is evolving. In this session we will learn the basics of Environmental, Social and Governance (ESG) and review the mechanics of how investment capital can make the world a better place, especially in areas of racial equality and environmental protection.

Areas covered:

- What is ESG?
- History of ESG investing
- How to measure ESG metrics
- ESG research tactics and resources

Mechanics of an Electronic Order Book

Module is an extensive study of how an electronic order book works and includes a working demo.

Areas covered:

- The world before electronic order books
- How does an exchange work?
- Mechanics of an order book
- Practical limitations of an order book

Mechanics of Asset Management

Students learn the parties, products, and strategies of Asset Management

Areas covered:

- What are the different types of Asset Managers
- What are the different products Asset managers invest in
- What are the different strategies used to differentiate Asset Managers from their competitors

Mechanics of Broker-Dealers

Students learn the basics and applications of Broker-Dealer liquidity

Areas covered:

- How does financial market liquidity work
- What do liquidity providers do
- Roles and responsibilities for Broker-Dealers

Electronic Trading in Fixed Income

Module examines the growth and development of electronic trading in fixed income markets.

Areas covered:

- Fixed income electronic trading by product
- Basic RFQ (Request for Quote) mechanics
- Advanced RFQ mechanics

Advanced Electronic Trading Mechanics

Module explains the basic evolution of algorithmic trading and the mechanics of high-frequency trading strategies.

Areas covered:

- Dynamics of trading large orders
- Benchmark algos (TWAP/VWAP)
- High-frequency trading mechanics
- HFT applications

Demystifying Central Banking

Module explains the history of the central banking system, basic mechanics of the Fed and the impact that central banking policy has on current markets.

Areas covered:

- Before central banking
- The role of the Fed
- Quantitative easing explained
- Central banking impact on current markets

Institutional Digital Asset Market Development

Module outlines the adoption of digital assets and crypto technology by traditional Wall Street institutions and outlines the key areas for institutional development

Areas covered:

- Adoption trends
- Pending regulations that impact market development
- Custody and clearing
- OTC market players and practices (institutional trading)

Mechanics of Exchange Traded Funds

Module examines the origin of ETFs, reviews product details and examines current applications and market workflows.

Areas covered:

- History and development of passive funds
- ETF basics
- ETFs in different asset classes
- ETF market mechanics (trading workflow)

Impact of Regulation on Market Development

Module outlines the details of key regulations that have impacted the development of modern capital markets.

Areas covered:

- Market moving regulations
- Update on Dodd Frank
- Update on MiFiD II
- Future Regulations (what to expect in the next 24 months)